



## HR/Personnel Dependent Upload Workflow

This document outlines the steps to load a file into the HR/Personnel applications to update an employee's dependents in the Employee File.

1. Create Program dictionary:

### STANDALONE PAYROLL

Personnel Dictionaries > Program > Enter/Edit.

Create a new entry with program type PP REV ELIG. Do a lookup at the program name prompt and select PP.PER.load.rev.elig.

The screenshot shows a software interface for creating a program dictionary entry. The title bar reads "ACA UPLOAD - ACA". The main area contains a form with the following fields:

Mnemonic	ACA UPLOAD
*Active	Y
*Name	ACA
*Program Type	PP REV ELIG
*Program Name	PP.PER.load.rev.elig

At the bottom right of the form, there are buttons for "Cancel", "Save", and several utility icons (help, back, forward, refresh, print).

## HUMAN RESOURCES

Human Resources: Dictionaries (N-Z) > Program > Enter/Edit.

Create a new entry with program type HR REV ELIG. Do a lookup at the program name prompt and select HR.EMP.load.rev.elig.

ACA - Affordable Care Last Edit: 06/18/15 15:05

Mnemonic ACA

\*Active Y

\*Name Affordable Care

\*Program Type HR REV ELIG

\*Program Name HR.EMP.load.rev.elig

Cancel Save ? [Icons]

2. In MIS a Map dictionary will need to be defined in order to run the Load Employee Dependent File routine and update the dependent's relationship (if desired, but not required). In order to set this up go to MIS > Communications > Maps > Enter/Edit.

PP ACA MAP - PP ACA RELATIONSHIP MAP Last Edit: 06/18/15 09:46

Mnemonic: PP ACA MAP

\*Active: Y

\*Name: PP ACA RELATIONSHIP MAP

\*Allow Reverse Mapping: N

Map From Value in Dictionary and Database: [ ]

Map To Value in Dictionary and Database: MIS.RELAT

Max Length: [ ]

If Data Value in File is	*Use This Value
01	SUBSCRIBER/EMPLOYEE
02	SPOUSE
03	CHILD

If Data Value in File is in the Range:

From	* Thru	*Use This Value
[ ]	[ ]	[ ]

For Other Data Values use: [ ]

If There is no Data Value use: [ ]

Cancel Save ? [ ] [ ] [ ] [ ] [ ]

- “Map To Value in Dictionary” prompt, define MIS.RELAT.
- “If Data Value in File is” prompt define the relationship code defined on the file.
- “Use This Value” prompt, do a lookup to the MIS Relationship dictionary to define the corresponding relationship this represents.
  - For example, if an employee’s child is on the file with code 03, define 03 in the first prompt, perform a lookup in the second prompt and select child.
  - Or if Husband is listed on the file, you would define Husband in the first prompt, perform a lookup in the second prompt and select Husband or Spouse.
- If you do not want to map the relationships or do not have them on your file, just create a map without entries. Leave “Map To Value in Dictionary”, “If Data Value in File is” and “Use This Value” prompt blank.

*Note: In order to load the dependent file, an entry from the MIS Map dictionary needs to be defined when running the Load Employee Dependent File routine. However, the file can still be loaded when no mapping is defined in the dictionary. If no mapping is set up the dependent’s relationship will not get updated in the Employee File.*

3. Specifications and a sample file:

The file that is loaded into the system will need to contain a header record as well as employee/dependent records. The header record can contain either one or multiple fields as shown below and is pipe(|) delimited:

Example 1: TRANSCOD|

Example 2: TRANSCOD|TRANSDAT|SUBSCRID|SSN|SUBFNAME|SUBLNAME|

The following fields are loaded for the dependents only onto the Skills and Dependents tab in the Employee File. Any fields that are not required can either be blank or space filled.

Field	Name	Required	Description
1	Transaction Code	Yes	Define S for employee or M for covered dependent
2	Date		Format: YYYYMMDD
3	Subscriber ID Number	Yes	The same ID number must be present for the employee and the dependents for that employee. For example, this can be the employee's number but most importantly it needs to be the same for the employee and the dependents to link them together.
4	Social Security Number	Yes	This information is required for the employee only. However, for ACA reporting, the dependent needs to have either their social security number or birthdate defined. This can be loaded with or without dashes.
5	First Name	Yes	
6	Last Name	Yes	
7	Middle Name		
8	Gender		Enter M or F
9	Relationship Code		An entry in the MIS Map dictionary needs to be defined in order to run the Load Employee Dependent File routine. In this dictionary mapping does not need to be defined unless you want the dependent's relationship to load the Employee File.
10	Birthdate		Format: YYYYMMDD. Although this is not a required field, for ACA reporting the dependent needs to have either their social security number or birthdate defined.
13	Street Address		
14	City		
15	State		

16	Zip		
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Sample Text File to upload with minimum fields defined:

TRANSCOD|  
S||8888|345431234|Sandi|Shea|  
M||8888|012548963|Paul|Shea|

Sample Text File to upload with additional data:

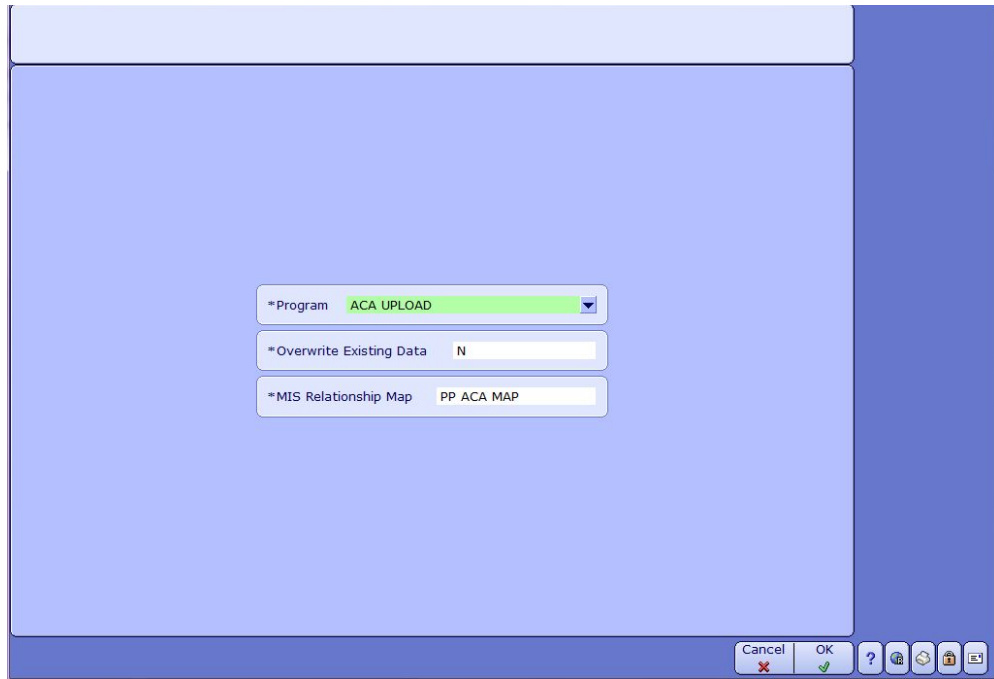
TRANSCOD|TRANSDAT|SUBSCRID|SSN|SUBFNAME|SUBLNAME|  
S|20150614|8888|345431234|Liz|Lequin|K|F|01|19710201|||19 LONG RD|BOSTON|MA|01754|  
M|20150614|8888|987785678|Chris|Ganno|P|M|02|19800201|||19 LONG  
RD|BOSTON|MA|01754|  
M|20150614|8888|876543455|Piper|Lequin|R|F|03|19950515|||19 LONG  
RD|BOSTON|MA|01754|  
S|20150614|345|456786584|Sue|Smith|L|F|01|19790511|||37 Main St|Westwood|MA|02472|  
M|20150614|345|238900865|Owen|Smith|S|M|02|19861203|||37 Main  
St||Westwood|MA|02472|

4. The procedure to load the dependent file into MEDITECH is located in Standalone PP facilities at the following location:

Personnel > Process Employees > Employee Payroll > Employee ACA > Load Employee Dependent file.

OR

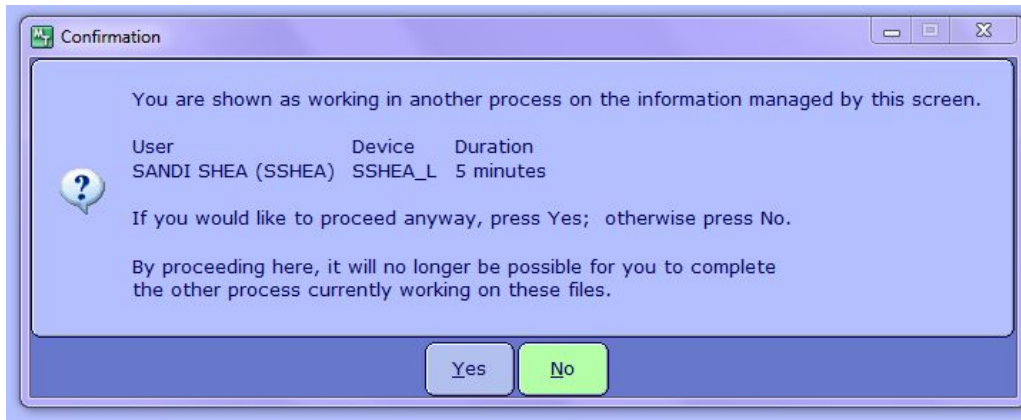
Human Resources (HR) > Employees > Employee ACA > Load Employee Dependent file.



Select the program and MIS relationship map dictionary entries that were created. If you define Y at the "Overwrite Existing Data" prompt the system will override an existing dependent's information in the Employee File with information from the upload file. The system will look to the dependent's social security number to determine if they already exist and should be overridden. If you define N at this prompt the system will only add new dependents to the Employee's File that are not currently defined and will not update existing dependents.

*Note: This routine will never delete an existing dependent from the Employee File, it will only add new ones or update current ones.*

Once you have defined all of the criteria to load this file, you will then be prompted to choose a file from your computer. When loading this file, if someone is working in an employee file that is requiring an update the following message will appear:



When you have completed the upload, if there were any employees who could not be updated an Employee Dependent Upload Exception Report will print noting who the Employees are and what error prevented them from being updated.

The example below is listing specific employees that could not be ID'd in the MEDITECH employee files. The system will determine this by comparing the Member/Subscriber Social Security Number to an employee defined in the system, if it is not located it will error out.

USER: MT Employee Dependent Upload Exception Report			
Employee Name	Employee #	Member Name	Error
JOHN ANDERSON			Unable to ID employee
MARCUS ANTHONY			Unable to ID employee
SEAN BLOCH			Unable to ID employee
MARCUS ANTHONY			Unable to ID employee